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Diversity and Adaptability: Tapping Into the Growing Global Tourism Market

October 4, 2019



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Welcome

- Introduction of Presenters by ABHTA
- About CHTA
- About South America Venture Ltd.
- About You
 - Why Are You Here Today?
 - Your Expectations Today?

Workshop Objectives

- **Provide Overview of Changing Global Tourism Marketplace**
- **Discuss Opportunities Presented to Antigua to Diversify Market Appeal**
- **Consider Cultural and Communications Needs of Latin American Traveler**
- **Share Lessons Learned from Best and Worst Practices**
- **Identify Factors Which Improve Ability to Generate Latin American Guest Satisfaction and Likelihood to Recommend**
- **Identify Personal Professional Strategies You Can Undertake to Grow and Diversify Antigua's Market Appeal**



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The Changing Global Marketplace



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Tourism Continues to Be Major Economic Driver Globally and Regionally



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GLOBAL DATA 2018



10.4%

GDP CONTRIBUTION



319^{MN}

JOBS GLOBALLY
(1 IN 10 JOBS)

While the global economy grew by 3.2%, **Travel & Tourism** grew significantly more at **3.9%**



3.2%



3.9%

1 in 5 new jobs were created by Travel & Tourism over the last five years



WORLD
TRAVEL &
TOURISM
COUNCIL

Source: World Travel And Tourism Council 2019



Tourism Continues to Be Major Economic Driver Globally and Regionally



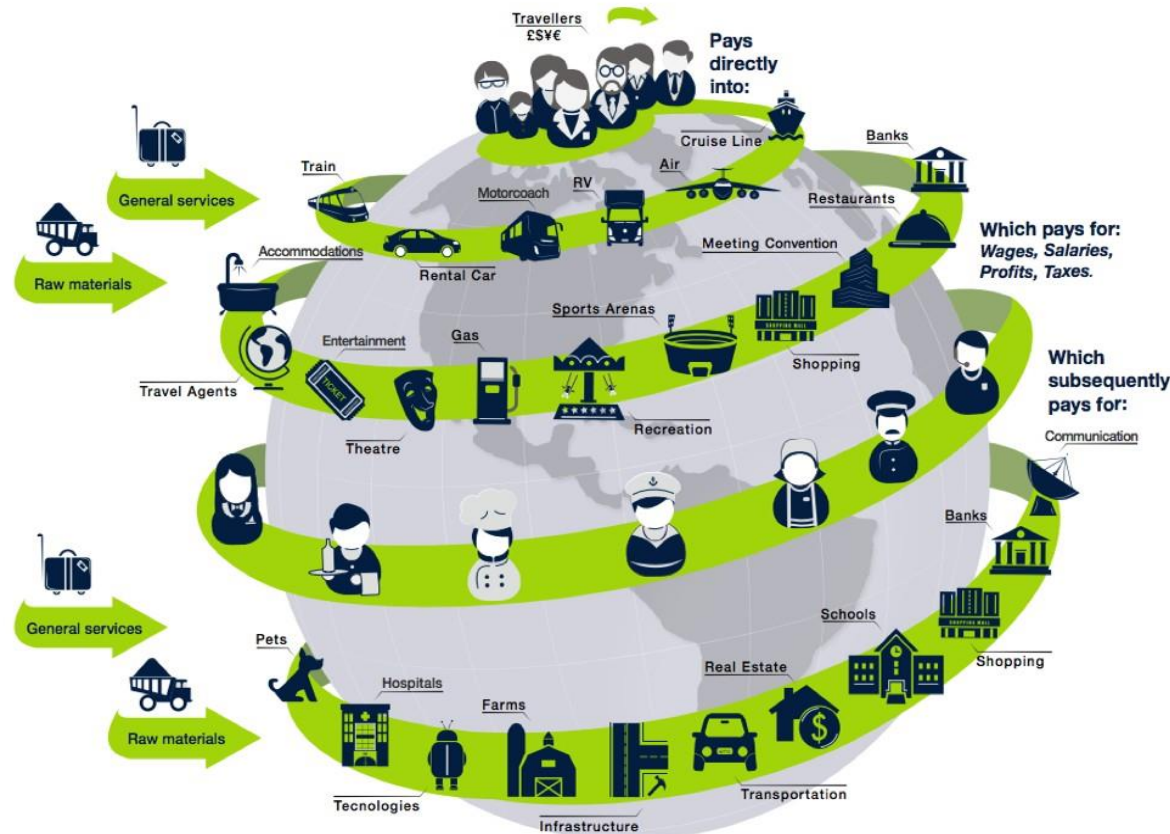
	<u>#</u>	<u>%</u>	<u>By 2028</u>
GDP Total Contribution	\$62.1B	15.5%	17.8%
Employment Total	2.4M	13.5%	3.0M Jobs
Visitor Exports	\$35.4B	20.7%	24.2%

Source: World Travel And Tourism Council 2019

ANTIGUA AND BARBUDA (based upon 2018 data, US\$)

GDP Total Contribution	\$1.4B	44.1%
Employment Total	16,300	44.1%
Visitor Spending	\$819 Million	

Indirect and Induced Impact of Direct Tourism Expenditures





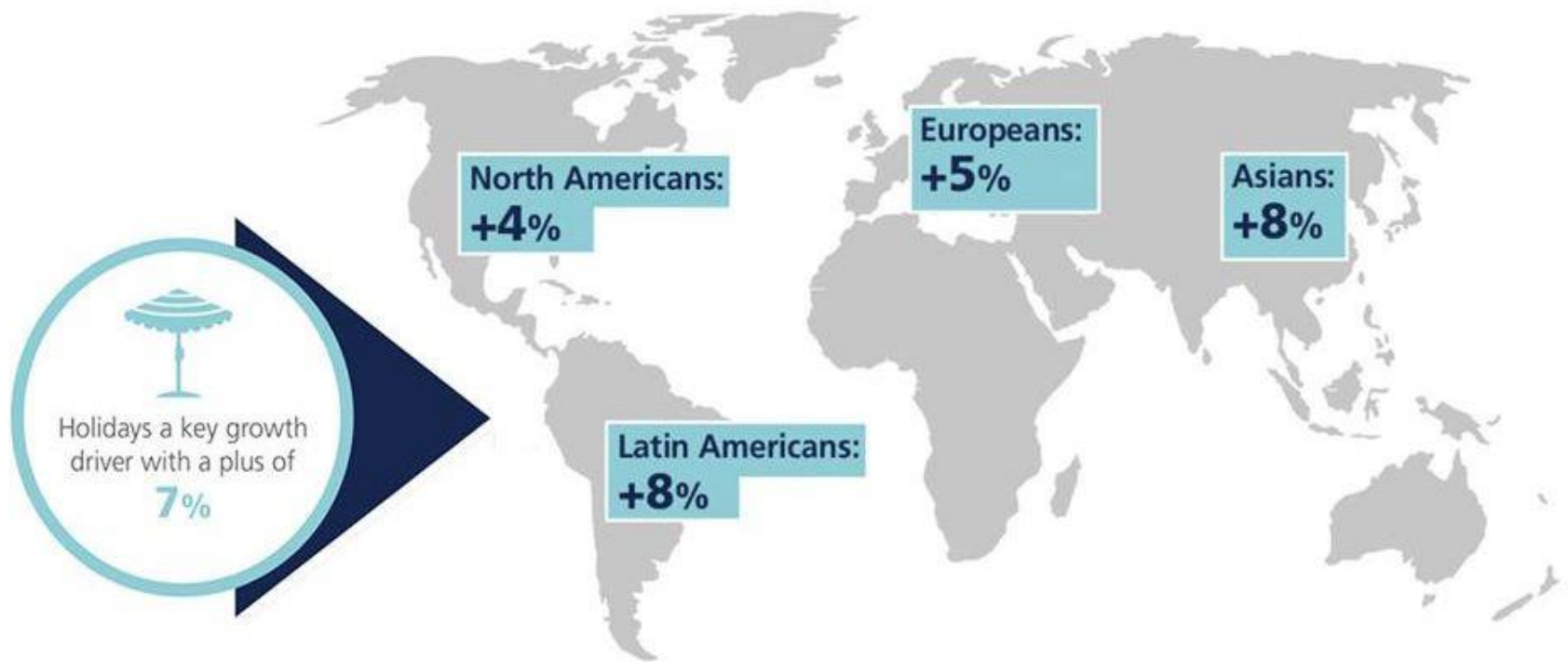
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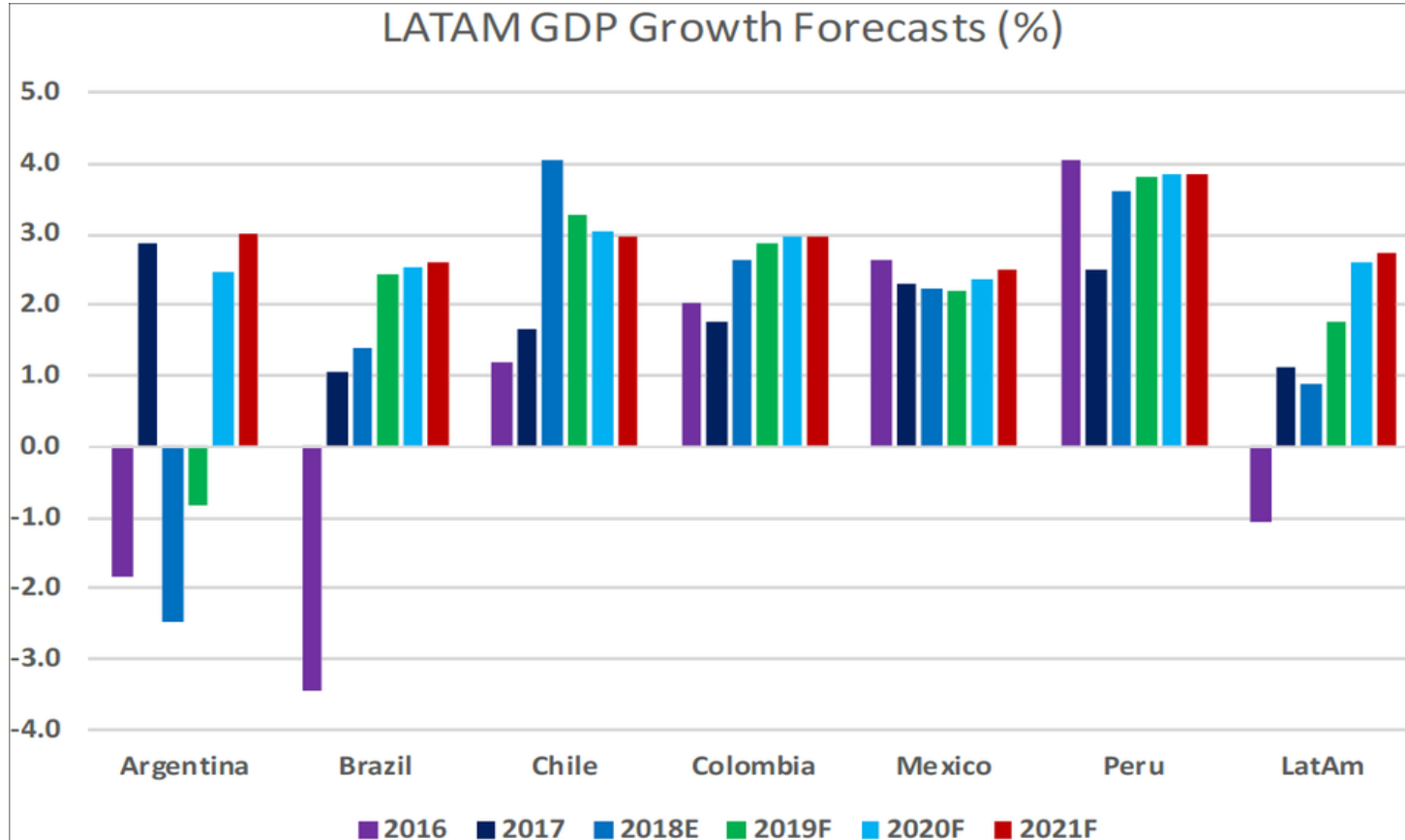
TOTAL WORLD: 6% MORE INTERNATIONAL OUTBOUND TRIPS



Source: ITB 2019



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Source: Forbes Travel



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TRAVEL TO THE CARIBBEAN

Source: Caribbean Tourism Organization



YEAR	Arrivals from South America
2008	898,928
2009	851,731
2010	887,760
2011	1,189,815
2012	1,393,259
2013	1,530,708
2014	1,745,471
2015	2,018,265
2016	1,851,425
2017	1,707,425
2018	1,745,319



Diversity: In Its Broadest Sense





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Travel and Tourism: Building a Better World

Proud to Be Part of This Incredible Force for Good. Tourism Helps to:

- **Break Down Prejudices**
- **Build Tolerance and Understanding**
- **Cultivate Cultural Awareness**
- **Create Appreciation of Diverse Cultures**
- **Build Skills, Shape Careers, Establish Enterprises**
- **Preserve and Protect the World's Treasures**
- **Save and Protect the Environment**
- **Shape and Evolve Communities, Societies, Countries, Regions**
- **Connect People**
- **Transform the Lives of Travelers and Stakeholders**
- **Promote Peace....Peace of Mind....Peace Amongst People**



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How One Community and a Company Turned Diversity Into Opportunity



**"Everyone is Welcome" – Awareness Campaign by the
Los Angeles Visitors and Convention Bureau**
https://laist.com/2017/04/18/everyone_is_welcome.php



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Turning Diversity into Opportunity Can Present Internal Cultural and Social Challenges

- **Fending Off Pre-conceived Negatives**
- **Creating an Internal Culture of Understanding Requires**
 - **Openness to Understanding**
 - **Recognition of the Personal, Business and Reputational Value of a Culture Which Accepts and Embraces Diversity**
 - **Requires Teamwork**
 - https://www.youtube.com/watch?v=fUXdrl9ch_Q



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Latin American Travelers

"There is no question that Latin American travelers are some of the most desirable hotel guests in the world. Brazilians are comfortable traveling far, due to their vacation periods they often stay for lengthy periods of times and with a culture of strong family values, they will often travel in multi-generational groups. They are very open to a wide variety of experiences and want to treat themselves to a variety of experiences both within and outside the hotels."

Simon Mayle, Head of Marketing, ILTM (Leading Event Management Company)



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LATIN AMERICAN TRAVELERS

TAKE LONGER HOLIDAYS, ARE MORE LIKELY TO EXPLORE
THEIR OWN COUNTRIES THAN GO ABROAD



Travel Days
Per Year

TOP VACATIONS TYPES



59%
Relaxing



41%
Visiting
Family



37%
Sightseeing



62%

Are destination
indecisive



84% Say budget
is a factor

71% Say ads can be
influential



50%

Use OTAs for
trip planning



68%

Travel by
plane



69%

Stay in
a hotel

LOCATION OF LAST VACATION



64%

■ Inside my country

■ Outside my country

expedia group™

media solutions

Source: [Latin American Travel and Tourism Trends Study](#),
Expedia Group Media Solutions, March 2018



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What is the Latin American Luxury Traveler looking for?

- Unique Experiences
- Adventure and Safari
- Handicrafts
- Culinary experiences
- Shopping experiences
- Exclusive Tours
- Cultural Immersion

"Our travelers are looking for destinations where they can find real and genuine experiences, intrinsic to the place. At the same time, they are seeking to spend their time at incredible hotels with excellent services and local flavor. Because of this, African safari's are one of our most successful tours."



















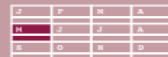

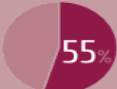

Paula Gamas. International Travel Group



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COMPARING LUXURY TRAVELLERS IN THE AMERICAS

	Latin America	North America
What Guests Care About	   staff attitude, room size & cleanliness	   bedrooms, breakfasts & views
Destinations About Which Guests Write Most	 New York City Buenos Aires Miami Rio de Janeiro Las Vegas	 New York City Las Vegas London Washington DC Cancun
Which Guests Are Most Positive & Negative	    Brazilians Argentinians	    Americans Canadians
Most Popular Day Guests Write	 Monday	 Monday
Most Popular Month to Write	 May	 April
Guest Satisfaction (% of Positive Reviews Written)	 55%	 65%



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Building the Latin American Market

Lessons Learned: The Bahamas Experience

“How we grew the Latin American market and almost blew it.”

- ✓ *2008 - Public-private sector decision to build the market. Visa policy changed. Approach to airlines and major LA Tour Operators.*
- ✓ *2009 - Potential Caught Attention of COPA Airlines and agreement reached for direct and seamless hub-turnaround flights to Nassau. Strong public-private sector outreach to develop markets.*
- ✓ *2010 – First COPA Flights commenced. Packages w/COPA, tour operators. Initial customer feedback not positive. Stakeholders review and strategize.*
- ✓ *2011 – Comprehensive initiatives put in place to meet market expectations – training – language, cultural nuances; operational changes.*



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Lessons Learned: The Bahamas Experience

Bahamas Latin American Stopover Arrivals and Destination Spend

<u>Year</u>	<u>#Arrivals</u>	<u>Direct Estimated Spend</u>
2008	16,257	\$20,500,000
2011	29,705	
2016	33,532	
2018	34,059	\$43,120,000



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Building the Latin American Market

Lessons Learned: The Bahamas Experience

As a result of this visit, how do you feel about recommending The Bahamas as a place for your friends/family?

Definitely will recommend.	68.3%
Probably will recommend	9.8%
Probably won't recommend	2.4%
Definitely won't recommend	2.4%
No response	14.6%



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Building the Latin American Market

Lessons Learned: The Bahamas Experience

What Experience Goals do we need to Set AND Meet?

- Possible Friendly Priorities

1. Restaurant & Bars
2. Beach Vendors
3. Security
4. Customs & Immigration
5. Airline Check In
6. Hotels

AREA	% of ALL VISITORS POSITIVELY COMMENTING ON FRIENDLINESS
Restaurants/Bars	0%
Beach Vendors	0%
Security	0%
Customs/Immigration	2%
Airline Check In	2%
Hotels	2%
Hair Braiders	6%
Ferries	6%
Straw Vendors	9%
Shops	11%
Jitney/Buses	12%
Taxi	14%



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Building the Latin American Market

Lessons Learned: The Bahamas Experience

What Experience Goals do we need to Set AND Meet?

- Possible
Language
Priorities

1. Airline Check In
2. Customs & Immigration
3. Hotels
4. Security Staff
5. Shops
6. Ferries

AREA	% of doing this Activity NEGATIVELY COMMENTING ON A LANGUAGE PROBLEM
Airline Check In	15%
Customs/Immigration	12%
Hotels	12%
Security Staff	8%
Shops	8%
Ferries	8%
Taxis	4%
Restaurants/Bars	4%
Activities	4%
Beach or Straw Vendors or Hair Braiders	4% (each)
Jitney/Bus	0%



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Lessons Learned: The Bahamas Experience

What are their Customer
Commandments?

Security

"They should have
staff that speak
Spanish"

Customs & Immigration

"They should know
several languages as
this place is visited
by people from
different cultures"



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Lessons Learned: The Bahamas Experience

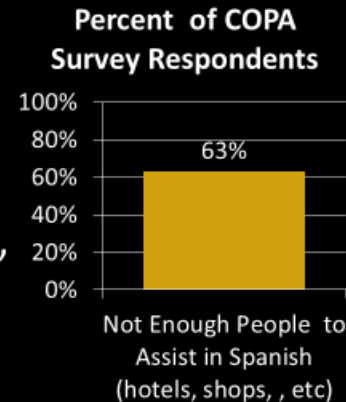
What are their Customer
Commandments?

Check In

“Language confusion –
bad treatment of
passengers”

“They spoke little Spanish”

“Our experience would
have been better if they
spoke Spanish”





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Lessons Learned: The Bahamas Experience

What are their Customer
Commandments?

Hotel

"In the hotel only 2 people spoke Spanish and one of them didn't understand so well."

"No one spoke Spanish, we were treated badly by security staff"

Boat Excursions

"On the boat excursion, no one explained to us what they were saying"



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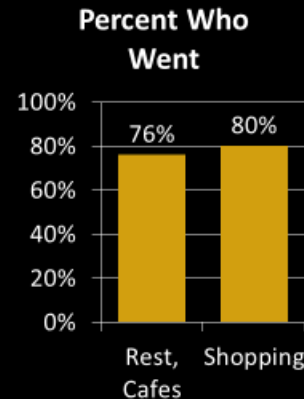
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Lessons Learned: The Bahamas Experience

What are their Customer
Commandments?

**Only 36% rated
Restaurants, Excellent**

“They are more focused on the Gringo Tourist and gave little attention to the Latin and the most important is the service, you can look for attention in”





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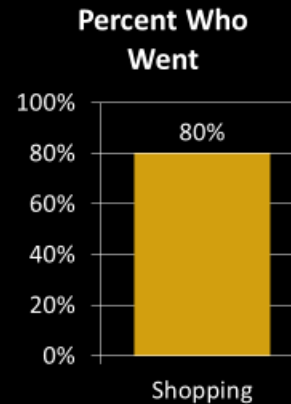
Lessons Learned: The Bahamas Experience

What are their Customer Commandments?

- **Thou Shall Try to Communicate in Spanish**

Only 39% rated Shopping as Excellent

"Not a lot of bargains. In fact it was difficult for us to ask questions because of the language barrier"





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Lessons Learned: The Bahamas Experience

What are their Customer Commandments?

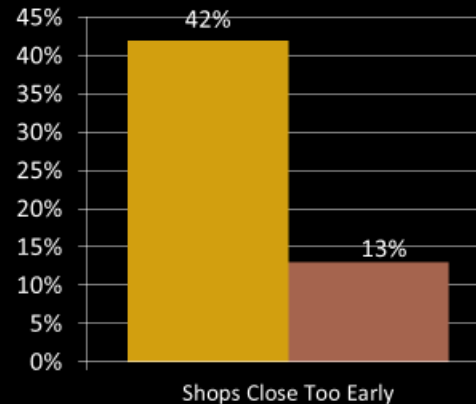
- **Thou Shall Not Close Your Shops Too Early**

This was the most frequently mentioned area they disliked.

"They close early, ...at one store they closed the door on us!"

% Disliked about Nassau/PI

■ COPA ■ Nas/PI 2006





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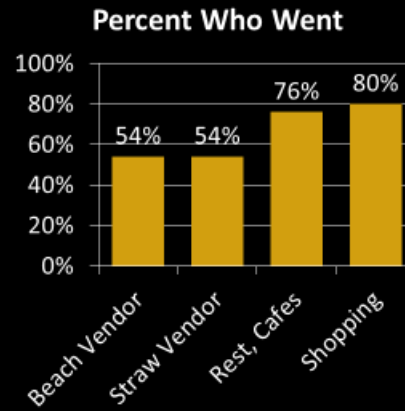
Lessons Learned: The Bahamas Experience

What are their Customer
Commandments?

**Costing possible
sales**

“We weren’t able to
communicate” (said
of Straw Vendor)

“We didn’t
understand her”
(said of Beach
Vendor)





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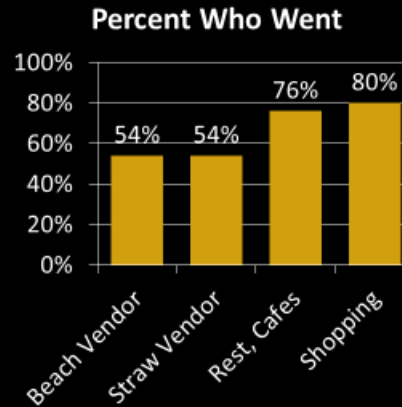
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Lessons Learned: The Bahamas Experience

What are their Customer
Commandments?

**Costing possible
sales**

“The Bahamas is a
fascinating place, but
the language barrier
doesn’t allow you to
get to experience the
attractions in depth.”





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Lessons Learned: The Bahamas Experience

What are their Customer Commandments?

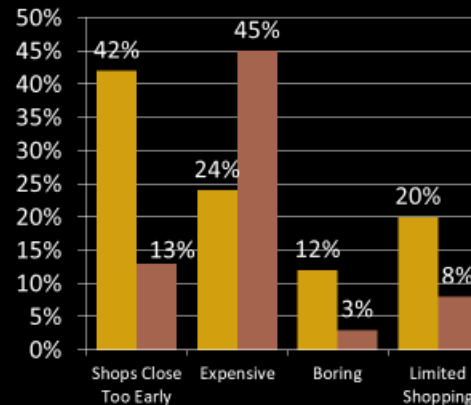
Thou Shall not be Boring

Just over one in ten
said there was not
enough to do, boring

“I think that bars
and restaurants
should close later,
after midnight”

% Disliked about Nassau/PI

■ COPA ■ Nas/PI 2006





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Building the Latin American Market

Lessons Learned: The Bahamas Experience

Communication is the Key to Success

**What some say about their
experience**

“Language is a barrier some persons showed no interest in trying to understand us.”

“I will recommend that only persons who speak English fluently should come to The Bahamas.”



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Lessons Learned: The Bahamas Experience

Communication is the Key to Success

**The real plea behind their
anger**

When asked what would make
their trip more enjoyable one
person said:

“For me, having been able to
communicate and make friends.”



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Lessons Learned: The Bahamas Experience

“....Si no habla ingles
esta muerto.”



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Building the Latin American Market

Lessons Learned: The Bahamas Experience

Turning Feedback Into Improvements - Language

- Contextual Language Training – Over 1,200 employees registered for Online LiveMocha. 800 successfully completed.
- Spanish and Portuguese Classes – 300 employees
- Company Training – Inhouse training.
- Employee Spanish Clubs established in hotels.
- Stepped Up Inhouse and Destination Monitoring of incidents, customer satisfaction levels.



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Building the Latin American Market

Lessons Learned: The Bahamas Experience

Turning Feedback Into Improvements – Operations

- Dining – menu items; menus multi-lingual; scheduling
- Inroom Communications – multi-lingual
- Signage – multi-lingual
- Designated Employees with fluency assigned or on quick standby
- Entertainment Schedules



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Bringing It All Home

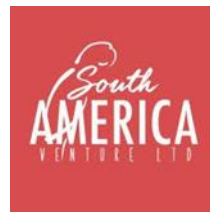
- **Further Insights on Cultural Nuances**
- **How to Adapt and Respond?**
- **Group Breakouts**
 - **Contextual language Exercise**
 - **My Plan Exercise**



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**Muchas gracias,
damas y caballeros.
¡Vamos a traerlo a casa!**



